

## Welcome!

### Section 508 Best Practices Webinar Series

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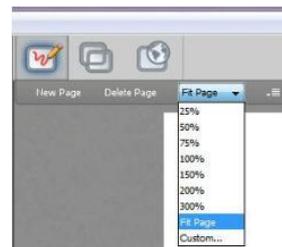
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## Welcome

This webinar is part of a series showcasing “Best Practices in Federal Section 508 Implementation”. Other presentations can be viewed at:

- [www.adaconferences.org/CIOC/archives](http://www.adaconferences.org/CIOC/archives) and
  - [www.fedlink.org/allqual/resource-shared-webinars.cfm](http://www.fedlink.org/allqual/resource-shared-webinars.cfm)
- A best practice is a policy, process, procedure or technique proven effective over time and repeatable by multiple agencies.
  - A best practice is generalized so that diverse agencies may use it in their own organizations but specific enough to provide useful guidance and instruction.
  - The CIO Council’s Accessibility Community of Practice has published a library of 508 Best Practices at [www.Section508.gov](http://www.Section508.gov).

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## Section 508 Best Practices Webinars

Webinars are bi-monthly:

- January, March, May, July, September, November

Next Webinar: July 31, 2018

- Topic: How to Update Agency Policies for the Revised 508 Standard
- Time: 1:00 to 2:30 p.m. Eastern

This webinar series is a collaborative program between the Accessibility Community of Practice of the CIO Council and The U.S. Access Board.

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Office of Government-wide Policy

## Revised 508 Standards & Procurement Processes

U.S. Access Board Section 508 Webinar Series

ACoP Education Committee | John Sullivan & Kevin Funk |  
May 29, 2018

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## Our Vision

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*All public consumers and the federal workforce have equal access to government digital information services regardless of disability status*

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## Our Mission

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*Build Accessible: Federal infrastructure is built to be accessible*

*Buy Accessible: Federal IT acquisitions require accessibility or clearly state exceptions*

*Be Accessible: Accessibility is part of how the Federal government does business*

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# Revised Section 508 Process & Acquisition Lifecycle

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The outline below illustrates how the 8 step process for ensuring Section 508 compliance fits within the acquisition lifecycle.

## *Acquisition Planning*

- Step 1: Inventory Your ICT
- Step 2: Determine Exceptions
- Step 3: Determine Standards
- Step 4: Conduct Market Research

## *Requirements Development*

- Step 5: Define Accessibility Provisions, Clauses, and Acceptance Criteria

## *Solicitation Issuance*

- Step 6: Prepare the Procurement Request / Solicitation

## *Contract Award*

- Step 7: Evaluate Proposals & Award Contract

## *Contract Administration*

- Step 8: Validate Contractor Compliance

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## Building IT Accessibility Requirements

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# Requiring Officials

Requiring Officials are responsible for developing requirements documents for the procurement of ICT products and services. They are required to:

- Document, in writing, the non-availability of ICT that fully conforms with the Revised Section 508 Standards.
- Provide an 'alternative means of access' for non-conforming features of ICT for individuals with disabilities to access and use the ICT.
- \*The 'Best Meets' exception provides a mechanism to help agencies balance business needs and obligations to procure ICT and conform to the Revised Section 508 Standards when an alternative that fully conforms is not available.

# Revised 508 Standards Applicability Checklist

Use this checklist to help you determine accessibility requirements for information and communication technology (ICT) in contracting documents, or systems requirements documentation.



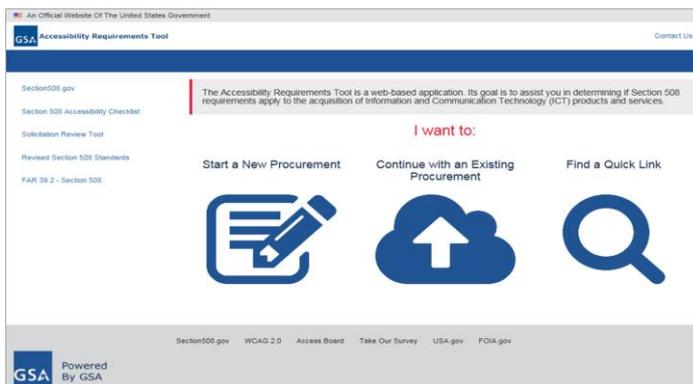
# Applicable 508 Standards & Exceptions Chart

This chart can be used to clearly communicate Section 508 standards and exceptions that apply to each item in a solicitation that contains ICT.

Exceptions, Functional Performance Criteria and Technical Requirements	What applies?	What functionality is covered?	Applicable Functionality	
			What applies?	What functionality is covered?
Exceptions	No exceptions apply	All functionality	Applicable exception(s):	
Chapter 3: Functional Performance Criteria	All apply	All functionality	<input type="checkbox"/> All apply <input type="checkbox"/> Does not apply <input type="checkbox"/> All apply except:	
WCAG 2.0 Level A and AA Guidelines	All apply	All functionality	<input type="checkbox"/> All apply <input type="checkbox"/> Does not apply <input type="checkbox"/> All apply except:	
Chapter 4: Hardware Requirements	Does not apply	All functionality	<input type="checkbox"/> All apply <input type="checkbox"/> Does not apply <input type="checkbox"/> All apply except:	
Chapter 5: Software Requirements	Does not apply	All functionality	<input type="checkbox"/> All apply <input type="checkbox"/> Does not apply <input type="checkbox"/> All apply except:	
Chapter 6: Support Services and Documentation Requirements	All apply	All functionality	<input type="checkbox"/> All apply <input type="checkbox"/> Does not apply <input type="checkbox"/> All apply except:	

# Accessibility Requirements Tool (ART)

Use ART to automate the development of accessibility requirements when purchasing IT products and services.



## Step 1: Inventory Your ICT

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Regardless of how you prepare accessibility requirements (Using ART or the Checklist) the first step is to know what type of ICT is being procured.



- ICT can include:
  - a) software,
  - b) hardware,
  - c) electronic content,
  - d) support documentation and services
- ICT may be comprised of:
  - a) Commercial-off-the shelf (COTS),
  - b) Government-off-the shelf (GOTS),
  - c) Custom-developed products,
  - d) Configuration, installation, integration, maintenance, and
  - e) hosting services for COTS, GOTS and custom-developed products.
- In most cases, ICT may fall under more than one category.

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## ICT Categories: Sample Questions

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ICT falls in 4 categories: Answer the Checklist or ART questions that pertain to the ICT Category being procured.

- 1. Electronic Content:** E205.3 Exception Are these NARA\* records? E205.2 Will the content be public-facing? E205.3 An official agency communication? Will the content be web-based?
- 2. Software:** Chapter 5 Is the software assistive technology? Will the software be web-based? Is the software also an authoring tool?
- 3. Hardware:** 404 Preservation of information Provided for Accessibility, 405 Privacy, 406 Standard Connections, 407 Operable Parts, 409 Status Indicators, 410 Color Coding, 411 Audible Signals, 302 All Functional Performance Criteria
- 4. Support Documentation and Services:** 602 Support Documentation, 603 Support Services

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## Step 2: Determine Exceptions

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Refer to your agency's Accessibility Policy to identify when formal approval is required by an agency representative to claim any of the following exceptions:



- **E202.2** Legacy ICT Exception
- **E202.3** National Security Systems Exception E202.4 Federal Contracts Exception
- **E202.5** ICT Functions Located in Maintenance or Monitoring Spaces Exception
- **E202.6** Undue Burden or Fundamental Alteration Exception
- **E202.7** Best Meets Exception

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## Step 3: Determine Standards

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Follow these steps to identify which Standards apply to ICT products, or use the ART tool:



- **Select the type** of ICT using the Instructions for the Revised Section 508 Applicability Checklist OR the ART tool
- If your product falls under a single category:
  - **Select the category** that best fits and only answer those Checklist or ART questions that pertain to this type of ICT
- **If your product spans multiple categories** (e.g., a VOIP IP solution that includes both hardware and software):
  - **Answer the questions** under each relevant category
- **Record your responses** in the [Revised 508 Standards Applicability Checklist](#) OR ART will do that for you.

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## Step 4: Conduct Market Research

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**Conduct market research while forming accessibility requirements to determine availability of conformant products. Market research:**

- Is an opportunity to gather and document accessibility information about products/services you require so you can make informed decisions about your procurement.
- Aids in determining availability of conformant products and/or if “Best Meets” or “fundamental alterations” exceptions are warranted.
- Is a procurement requirement as specified in Federal Acquisition Regulation (FAR).
- Is required before establishing need for a Sole Source or Brand Name procurement.

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## Developing Solicitations & Awarding Contracts

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## Step 5: Define Accessibility Provisions, Clauses, and Acceptance Criteria

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Prepare solicitations, statements of work, or other procurement documents. The Toolkit provides sample language for including:

### *Specialized Requirements*

- Custom ICT Development Services
- Installation, Configuration and Integration Services
- Maintenance Upgrades & Replacements
- Service Personnel
- Hosting Services

### *Acceptance Criteria*

- Validation for ICT Items
- Documentation Requirements
- Conformance Reporting

### *Contractor Evaluation Factor*

- Section 508 evaluation factor
- Example: Evaluate contractor's ability to meet Section 508 requirements

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## Step 6: Prepare the Procurement Request/Solicitation

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Incorporate the Requirements, Acceptance Criteria and applicable contractor evaluation factors (from Step 5) We recommend requesting the offeror to provide:

- Accessibility Conformance Report (ACR) for each ICT item
- Supplemental Accessibility Report (SAR)
- Remediation plans for features that don't fully conform
- Description of training on the accessibility features of the ICT products and services
- Demonstration of some or all items in the solicitation
- Samples and demonstrations of software if the product generate electronic content (e.g. content management systems)
- State that the agency reserves the right to perform testing on some or all of the offeror's proposed ICT items
- Specify what versions should be tested (no trial versions) Consider stating that trial versions of ICT products or services will not be considered for testing purpose. Upon award, any ICT product provided for testing by unsuccessful offerors will be returned at the offeror's expense

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## Step 7: Evaluate Proposals & Award Contract

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Evaluate offeror proposals according to your source selection criteria and award the contract. We recommend following these steps:

- Confirm pre-award deliverables required by solicitation are provided by contractor and meet minimum requirements of solicitation.
- If doing source selection with evaluation factors, evaluate proposals in accordance with solicitation criteria.
- The 508 Standards Toolkit can assist with confirming pre-award deliverables and evaluating proposals.

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## Step 8: Validate Contractor Compliance

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After contract award, validate that the contractor complies with the requirements of the contract by:

- Testing ICT accessibility requirements
- Reviewing accessibility documentation provided by contractor
- Notifying the contractor(s) when ICT doesn't meet requirements; ensure the contractor(s) remediates deficiencies in accordance with the contract
- Identifying expected documentation and how the Section 508 toolkit can assist
- Documenting contractor performance and compliance in past performance

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## Appendix

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### Roles & Responsibilities

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- CT Program or Project Managers
- Requiring Officials
- Section 508 Coordinators/Program Managers
- Section 508 SMEs
- CORs
- COs
- Procurement Officials

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## Specify Procurement Requirements

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Learn how to prepare solicitations, statements of work, or other procurement documents. **Resource:** [How to Define Accessibility Provisions, Clauses, and Acceptance Criteria](#)

Learn how to communicate accessibility requirements and contract provisions to vendors; includes guidance on the [Voluntary Product Accessibility Template 2.1](#). **Resource:** [How to Request Accessibility Information From Vendors and Contractors](#)

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## ICT Inventory Reference Materials

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[Accessibility Requirements Tool](#) - Automates the Revised 508 Standards Applicability Checklist; generates an accessibility reporting requirements template

[Revised 508 Standards Applicability Checklist](#) - Use this checklist to document your accessibility requirements for ICT products

[Instructions - Revised 508 Standards Applicability Checklist](#) - Step-by-step guidance on how to complete the Standards Applicability Checklist

[Applicable 508 Standards and Exceptions Chart](#) - Sample template for reporting standards and exceptions in solicitations

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Questions?

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## Contact Us

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## **Next Session – Webinar Series**

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**July 31, 2018**

Topic: How to Update Agency Policies for the Revised 508 Standard

Time: 1:00 to 2:30 p.m. Eastern

Register: [www.adaconferences.org/CIOC](http://www.adaconferences.org/CIOC)

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